

Work Package Form Instructions

All data is required unless specifically noted as optional. A separate work package form is required for each program code.

01

Task Information:

This section identifies which work package is being documented.

02

Work Package #: Identify the work package number.

- If this is an **ongoing** activity, you should provide the same work package number that was used for FY96.
- If you are uncertain of the work package number, look up the number in the Budget Book or FMIS (program code short description) or contact BUS-3 for assistance.
- If this is a **new** activity, leave this line blank or write in "NEW."

03

Title: Indicate the title of the program.

04

Type of Indirect: Indicate the type of Indirect funding being requested. The options for this field are: G&A, Recharge, or Organizational Support.

05

Major Functional Category: Specify the functional area in which this activity best fits. These functional areas are defined in the budget call documentation.

- (01) Director's Office
- (02) Public, Governmental, and Community Outreach
- (03) Legal
- (04) Institutional Program Development
- (05) Management and Administration
- (06) Financial Management
- (07) Property Acquisition and Management
- (08) Human Resources
- (09) Training
- (10) Environment, Safety, and Health
- (11) Facilities Management
- (12) Safeguards and Security
- (13) Information Infrastructure
- (14) Library, Mail, and Communications
- (15) Fabrication
- (16) Telecommunications
- (17) Equipment Maintenance and Calibration
- (18) Quality, Planning, and Policy
- (19) Other
- (20) Transition Labor
- (22) Performance Awards

06

Start Date: Note the date the activity will start. If it is an ongoing activity, this field may be left blank.

Work Package Form Instructions (continued)

- 07** **End Date:** Indicate the date the activity will end. If it is an ongoing activity, this field may be left blank.
- 08** **Ongoing Task or New Effort:** Check one of these boxes to indicate whether the activity is ongoing or new. Generally, if there is an existing program code for the activity, it is ongoing. If there is not, it is new.
- 09** **If task is ongoing, please specify program code:** Enter an active W or X program code.
- 10** **Summary Cost and FTE Information:**
This section identifies current costs for this work package as well as target and requirements cases.
- 11** **FY96 Projected Cost:** Enter your anticipated costs for FY96 for comparative purposes.
- 12** **FY97 Target:** Indicate your FY97 request at the target level. The sum of all your work packages at the target level **must** be less than or equal to the target provided by BUS-3.
- 13** **FY97 Requirements:** Identify your FY97 request at the requirements level. For most programs, this will be the same as the target case. The amounts in this column should represent the full amount that you feel is required to run the program, not just the increment above the target amount.
- 14** **FY98 Requirements:** Indicate your best estimate of how much funding this activity will require in FY98.
- 15** **FTE Estimates:** Provide projected actual FY96 FTEs, FY97 FTEs that can be supported at the target level, FY97 FTEs that can be supported at the requirements level, and FY98 FTEs that can be supported at the requirements level.
- 16** **UC Employees (FTEs):** Indicate all UC employees including Students and reflect this number as FTEs.
- 17** **Contract Labor (FTEs):** Provide the number of contract labor employees and reflect this number as FTEs.

Work Package Form Instructions (continued)

- 18 **Cost Estimates:** Provide projected actual FY96 cost, FY97 cost at the target level, FY97 cost at the requirements level, and FY98 cost at the requirements level. Show cost by Operating Statement line numbers as indicate.:
- Operating Statement Line B **Staff Cost**
 - Operating Statement Line C/D/E **Travel/Material/Service**
 - Operating Statement Line F **Prog Recharge**
 - Operating Statement Line G **Equipment**
 - Operating Statement Line H **Workplace**
 - Operating Statement Line I **Institution**
 - Operating Statement Line J **Management Support**
- 19 **Total Cost:** Sum of the previous five lines. This represents the total funding for this work package.
- 20 **Submission Information:** This section identifies the organization requesting funding and the individuals responsible.
- 21 **Division Code and Title:** Enter the two-digit division code (6C, 8B, etc.) and provide the name of the division.
- 22 **Work Package Prepared by:** Provide the name and Z-number of the individual who compiled the information for the work package.
- 23 **Work Package Approved by:** Provide the name and Z-number of the manager who has reviewed the work package and is approving it for submission
- 24 **Product Code/Description:** Enter the product code, product name, and percentage of the work package relating to that product code. Percentages should add up to 100% for each work package. If more than four products relate to a single work package, provide additional product codes, names, and percentages on an attached sheet.
- 25 **The following narratives are required with each work package:** Attach the following items to each work package. Review teams are more likely to read brief, concise narratives than lengthy, detailed ones.
- 26 **Task Description:** Briefly describe the task being funded at the target level. (This is not required for ongoing work packages.)
- 27 **For Recharge: Summary of who major customers are/will be:** Provide a brief summary of who your Recharge customers are. (This is not required for ongoing work packages.)
- 28 **For Requirements: Describe the added value of funding at a higher level.** Provide a brief description of why the higher level of funding is needed..